

## SYSTEM AND METHOD FOR GIVING APPRECIATED ASSETS

## ABSTRACT OF THE DISCLOSURE

Giving appreciated assets is accomplished by analysis and processing for tax-advantaged asset transfer to charity. Easy access to sophisticated evaluation tools for choosing gifts that maximize tax-efficient giving; fully automated transfer mechanism for giving appreciated assets on a continuing basis (e.g., monthly or quarterly); speed of transfer; "point, click and give" ease of transferring assets to charity; removal of wealth barriers in the area of asset gifting; back-office support for the transfer of assets to charities and donor advised organizations; and an ability to gift unrealized gains (while keeping 100% of the basis) through currently existing hedge funds is provided.

2025 RELEASE UNDER E.O. 14176